

This job aid will assist in updating customer and interfund contacts. For entering new contacts, please refer to SMART Training Course AR350: Maintaining Customers.

User Roles that can update contacts are: Agency Customer Creator, Agency AR Admin, Central AR Configurator, Agency Billing Admin, and Central Billing Configurator.

1. Navigate to Customers>Contact Information

A search page will be displayed. Enter your search criteria and click the Search button.

Contact Info

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value
Add a New Value

SetID: = 36500 🔍

Contact ID: begins with 🔍

Contact Name: begins with

Customer SetID: begins with 🔍

Customer ID: begins with 🔍

Customer Name: begins with

☐ Include History ☐ Case Sensitive

Search
Clear
[Basic Search](#)
 [Save Search Criteria](#)

Search Results

View All					
			First ◀ 1-5 of 5 ▶ Last		
SetID	Contact ID	Contact Name	Customer SetID	Customer ID	Customer Name
36500	1	Prince Charming	36500	08AR0501	Cinderella
36500	1	Prince Charming	36500	08AR0502	Snow White
36500	2	Ken Smith	36500	0000000000000001	Clever's
36500	MAIN	Receivables	36500	36500	KS Public Employees
36500	TESTCONTACT	Contact for 08AR05	36500	08AR0502	Snow White

[Find an Existing Value](#) | [Add a New Value](#)

2. Select the Contact ID that needs to be updated.
3. Click the blue plus sign (+) on the right of the page.

Contact

SetID: 36500 Contact ID: 1

Contact Information Find | View All First 1 of 1 Last **+**

*Effective Date:	01/01/2001	*Status:	Active
*Name:	Prince Charming	*Contact Flag:	External
Title:		External Contact	
Email ID:	prince.charming@disney.world		
Salutation Code:		Salutation:	
*Preferred Communication:	Call	Call	
Language Code:	English		
Person ID:			

[Contact Customer Information](#) [Contact Phone and Type](#) [User Profile](#)

[Return to Customers](#)

[Save](#) [Return to Search](#) [Previous in List](#) [Next in List](#) [Notify](#) [Add](#) [Update/Display](#) [Include History](#)

Note that the Effective Date has changed to the current date and there are now two pages.

[New Window](#) | [Print](#)

Contact

SetID: 36500 Contact ID: 1

Contact Information Find | View All First 1 of 2 Last **+**

*Effective Date:	06/10/2010	*Status:	Active
*Name:	Prince Charming	*Contact Flag:	External
Title:		External Contact	
Email ID:	prince.charming@disney.world		
Salutation Code:		Salutation:	
*Preferred Communication:	Call	Call	
Language Code:	English		
Person ID:			

[Contact Customer Information](#) [Contact Phone and Type](#) [User Profile](#)

[Return to Customers](#)

[Save](#) [Return to Search](#) [Previous in List](#) [Next in List](#) [Notify](#) [Add](#) [Update/Display](#) [Include History](#)

4. Make all updates as necessary and click the 'Save' button.